



State of Utah

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October 26, 2005

***** ADDENDUM *** ADDENDUM *** ADDENDUM *****

SOLICITATION: JG6005
DUE DATE: November 2, 2005
TIME: 3:00 PM
DESCRIPTION: eREP Medical Services Project

ADDENDUM #1

The following are to be added or changed to the specifications for this RFP:

1. Please find attached a copy of the questions received with their respective answers.
2. With procurement, process questions contact Jared Gardner (801) 538-3342.

*****END OF ADDENDUM*****

To acknowledge receipt of addendum, include a copy of this addendum with RFP submittal or give written acknowledgement with the RFP. It shall be the responsibility of the bidder to appropriately disseminate this information to all concerned prior to the assigned bid time.

Company Name

Signature

Date

Pre-Submitted Questions - eREP Medical Services Project
RFP JG # 6005

No.	Question	Department Answer to Question
1	Will a Utah based Company get any preference over Companies based outside the State of Utah?	No preference concerning where the firm is headquartered.
2	Since the services are required to be provided onsite in Utah, but the provider Company may be located outside the State of Utah, what should be the response to the following question on the Agency Contract form: "The undersigned certifies that the goods or services offered are produced, mined, grown, manufactured, or performed in Utah. Yes _____ No _____. If no, enter where produced, etc. _____" ?	The answer would be yes, because we require that the consulting services be performed at the eREP offices, in American Fork, Utah. This requirement is stated in paragraph 3.2.4 of the RFP: "Contractor must conduct its work on-site at the eREP project."
3	Will the state publish any list of Companies intending to bid?	The State does not have a list of companies intending to bid.
4	Section 1.11: Can confidential resumes submitted with the proposal be marked as "Proprietary Information" and not be made public?	Yes, resumes may be marked "proprietary information" for confidentiality reasons.
5	Section 3.1.3: What minimum information should be submitted as part of a "Corporate Reference"?	<p>If the company is a US SEC regulated, publicly traded firm, then a reference to the stock exchange symbol should be sufficient. If the proposing firm is a subsidiary of a parent firm, please so indicate.</p> <p>If the proposing privately held, we would like minimum information necessary to determine the size and general financial condition of the firm submitting the proposal. We will keep this information confidential. This would consist of the firm's latest annual balance sheet and income statement.</p> <p>All proposing firms must provide "a written description of their (corporate or firms) experience and ability in providing resources for the skilled areas."</p> <p>All proposing firms must provide three references of other organization's projects for which they have provided consulting resources, preferably with similar technologies. We already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.</p>
6	Section 3.1.3 & Section 3.1.4: What is meant by "Provided references should not include resources associated with the eREP project"? Please explain.	We already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.

No.	Question	Department Answer to Question
7	Section 3.1.3: We had participated in the eREP project development earlier. Can we include that as a "Corporate Reference"?	The corporate information should include the work that was completed on the eREP project. We already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.
8	Section 3.1.4: We had participated in the eREP project development earlier. Can we include resources that worked on eREP earlier but are not on eREP now, in our list of "Potential Candidates"? Can such resources provide eREP project management as their reference?	Yes. Resources who previously worked on the eREP project can be listed as "potential candidates". We already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.
9	Section 3.1.4: Can only permanent employees of a Company be submitted as "Potential Candidates" by that Company, or can prospective employees / consultants be also submitted as "Potential Candidates"?	No, prospective employees can be submitted as potential candidates. This information should be noted in the bid response. However, there should be some pre-arrangement between prospective employees and vendors submitting bid proposals so that we do not evaluate and score "phantom employees".
10	Section 3.1.4: How would the state evaluate a situation where two companies submit the same individual as a potential candidate?	Assuming two different vendor proposals present their proposed consultant's skills equally effectively so that the same evaluation scores result, then (in the following order): (1) Price would be the determining factor – we would select the vendor offering the lower price for the same person. (2) The proposing vendor more willing to comply with our contract terms and conditions (T&C's) could also be the one selected. (3) If this still remains equal after factoring in pricing and T&C's, then we would have to do a request for a Best and Final Offer (BAFO) to the two vendors proposing the same individual at the same price and contract T&C's. (4) If this still did not resolve the issue, we would then do a request for BARFO, a Best and Really Final Offer, to the two vendors proposing the same individual at the same price and same T&C's. (5) If the BARFO process still did not resolve the issue, we would then apply the King Solomon rule. Although we have encountered this problem in previous RFP evaluations and contract awards, we have never needed to proceed beyond step (1).
11	Section 3.1.5: Many people have multiple skills. Can a Company submit the same candidate for multiple expertise areas?	Yes, a person can be submitted as a potential candidate for more than one expertise area.
12	Is "Curam Software Inc." allowed to bid on this RFP?	Yes, this RFP is open to all vendors, including Curam Software Inc if they so desire to bid.

No.	Question	Department Answer to Question
13	Section 3.1.5 & 3.2.2: Will the Curam framework training and certification provided by Companies other than Curam Software Inc. be considered at par with that by Curam Software Inc? If not, then we would consider these requirements to be restrictive and providing an unfair advantage to Curam Software Inc., and request for deletion of these requirements.	Yes, equal quality training provided by others will be evaluated equally. That is the State's normal practice. Product based skill certifications typically relate to specific products. For example, if we require Novell CNE certification because we use Novell networking software, that would not be an overly restrictive requirement. A vendor could obtain Novell CNE skills at many potential vendor sources. If we would allow substitution of another product skill certification different from the products that we use in our specific technology environment, the use of professional skill certifications would be useless as a quality measure / evaluation criteria.

No.	Question	Department Answer to Question
14	Section 6.1: Please provide details of the evaluation criteria that would be employed to rate Companies and their potential candidates and arrive at total "Weight", i.e. how many points for each of the skill & preference stated in the "Skills Matrix Template"?	<p>Below is a description of the ratings to be provided and examples for a particular skill area.</p> <p>Rating 1 – The proposed developer is learning the skills, but still has little knowledge or experience of it.</p> <p><u>Example: JAVA</u> – The proposed developer is learning JAVA, either through a formal training program or on his/her own through a book or online training, but has had little or no experience in applying the skill.</p> <p>Rating 2 – The proposed developer has had training and perhaps some basic experience in this area or can use the technology with guidance and supervision. The proposed developer is comfortable discussing a business problem in the particular area, but does not have enough knowledge and experience to help set direction. This proposed developer typically has less than two years of experience with a particular technology.</p> <p><u>Example: JAVA</u> – The proposed developer has been trained in JAVA and perhaps even had the opportunity to maintain a program or two. He/she still requires guidance and help in writing and/or maintaining code.</p> <p>Rating 3 – The proposed developer has broader experience within an area and more knowledge of the functions of a particular technology. The proposed developer still needs guidance, but limited supervision. Given a task and a direction, the outcome of a project is not uncertain. The proposed developer likely has between one and four years of experience with this area or technology family.</p> <p><u>Example: JAVA</u> – The proposed developer is a competent JAVA developer and can handle most coding problems. The proposed developer has a working knowledge of how JAVA functions.</p> <p>Rating 4 – The proposed developer has extensive experience and knowledge of a business area or technology. This person knows how to get things done in an efficient and effective way. The proposed developer's comments are heard in meetings, or are sought, and are heeded in many cases. People come to this proposed developer to understand a particular technology, and he or she is recognized as an expert in that technology. The proposed developer probably has three to five years of varied experience with a given technology, and has been specializing in this field for at least that long.</p> <p><u>Example: JAVA</u> – The proposed developer is a competent JAVA developer had can handle virtually all coding problems. The proposed developer has an excellent understanding of how JAVA functions across hardware platforms and can develop applications that function in a cross-platform environment. The proposed developer is recognized as having mastered the language and is a resource to others.</p> <p>Rating 5 – The proposed developer has very extensive experience and knowledge of a business area or technology. This highly-valued developer not only solves problems with creative solutions as they occur, but anticipates problems that could arise and negates their influence with decisive action. The proposed developer is also a master at knowing what problems might seem important, but are best dealt with by masterful inaction. You trust this person to set direction for a business process, to know the "pot holes" along the way, and to know how to ameliorate difficulties in the external environment. The proposed developer not only knows how to get things done, but gets things done. When given a problem, the problem is effectively resolved. No more worry need to be spent on it. When this person speaks in a meeting, people not only listen, they understand. This proposed developer has more than five years of varied experience with a given technology or business area, and has been recognized as an expert.</p> <p><u>Example: JAVA</u> – The employee is recognized as an expert developer; understanding virtually every aspect of JAVA development, the language and its nuances. He/she has an extensive history of developing applications in the language and developing applications of the highest quality in a rapid timeframe.</p>

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15	Regarding the assignment / subcontract clause (T&C 21 of JG6005.): As long as XYZ Inc. is an awarded vendor on the skill areas, under this contract we are able to request people via our sub-contact partners provided there are no special demands upon the State of Utah as a result of this relationship or a shift in ownership of the primary staffing contract. Is that correct?	The intent of this state-wide contract term and condition is to preclude substitution of another less qualified vendor in our contracts without our approval. When we request proposals, we evaluate in detail the professional skills and experience offered by the vendor in relation to our specification requirements. If a situation arises concerning switching vendors after the award determination, we need to approve proposed vendor substitution or contract assignment. The intent of the clause is to preclude a bait and switch type situation. This T&C is not intended to preclude vendors from using subcontractors, which is a normal practice when vendors provide professional services to the State.
16	What date do you expect to award the contract?	As soon as possible. Our objective is to have all consultants working by the start of the new year. Since each contract is negotiated, and the length of negotiations varies vendor to vendor, exact dates are not known. State Purchasing makes the contract award, which we currently anticipate to occur
17	What is the expected contract start date?	As soon as possible. Our objective is to have all consultants working by the start of the new year.
18	What is the estimated start date for each role?	As soon as possible. Our objective is to have all consultants working by the start of the new year.
19	Can you give an estimate of how many people are required for each role?	The intended results of this RFP are to establish a pool of knowledgeable contractors from which the State can select individuals based on a variety of factors deemed necessary and the time at which services are anticipated or required. There are several positions such as the Development Manager, Conversion Manager, Project Plan Administrator that will only have one resource. There are others such as Developers and Business Analysts that will be one to many resources. The State will determine how many individuals will be needed for each role, which may vary throughout the project.
20	Do the following 2 Terms & Conditions apply to the work we will be doing? * Department of Workforce Services, Modified Terms and Conditions: #15: Grievance Procedure (page 20) * Department of Workforce Services, Modified Terms and Conditions: #20: Third-Party Reimbursement and Program Income: Other contracts (page 21)	Department of Workforce Services T&C # 15 <u>does not apply</u> , and we will eliminate it in the contract negotiations. The intent of this T&C is for those types of contracts where the vendor is providing services to DWS clients, i.e. the public. It's intent is to allow these clients a process to handle denial of benefits disagreements. This does not apply to IT consulting services types of contracts. Department of Workforce Services T&C # 20 <u>does not apply</u> , and we will eliminate it in the contract negotiations.
21	Is the Project Plan Administrator role closer to that of an administrator or a manager? Please help us understand this role better.	The Project Plan Administrator role will be responsible for all administrative tasks of the project plan, including develop, coordinate, track, and monitor the project plan. The person will be viewed as a project plan coordinator and not as a project manager.
22	Can we propose the same person for multiple roles if they are qualified for multiple roles?	Yes, a person can be submitted as a potential candidate for more than one expertise area.

No.	Question	Department Answer to Question
23	Section 3.1.5: In the "Skills Matrix Template" preference points have been earmarked for a number of Curam Version 4 training courses. Please note that Curam Version 4 has still not been released, and Version 4 training courses have recently been announced by Curam Software Inc. These courses are still not widely available in the US. We would therefore request that Curam training course requirements be removed from the evaluation criteria.	The State's desire is to have individuals that have Curam training and expertise. The classes identified in the preferred list do not require Curam v4.0. Preference points will be awarded based on training and practical experience.
24	The questions are due on October 20, 2005. No date is given as to when the questions will be answered. The response to the RFP is due November 2, 2005. There is very little time to incorporate the responses to the questions into our response to the RFP. Would the State grant an extension to the RFP due date beyond November 2, 2005?	The addendum will be published 10/26/2005. No extension will be granted.
25	Would you please make the RFP available in MS Word format?	Alan Carlsen sent the RFP in Microsoft Word file format to each vendor who requested it. If anyone else wants it, please contact alancarlsen@utah.gov and he will send you a Word version of the RFP.
26	3.1.3 Corporate References (Page 26) Can one of the <u>corporate references</u> be the original eREP project for TANF if the <u>resource proposed</u> (potential candidate) is NOT currently working on the eREP TANF or Food Stamp programs?	The corporate information should include the work that was completed on the eREP project. We already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.
27	Can one of the <u>personal references</u> be the original eREP project for TANF if the <u>resource proposed</u> (potential candidate) is NOT currently working on the eREP TANF or Food Stamp programs?	The individual information should include the work that was completed on the eREP project. We already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.
28	3.2.12 (Page 36) states, "Bidders must provide a minimum of three resumes of potential candidates for each specific role that they propose to bid." Is this an absolute requirement? What if the bidder only has two excellent potential candidates?	As stated in section 3.1.4, "To support the evidence that the offeror can provide resources with the requested skills, the offeror shall provide a minimum of three resumes of potential candidates for each specific role they propose to bid." The reason for three resumes is for the vendor to provide the evidence that they will be able to provide a resource or resources for the project duration.
29	4.2.2 Skills Matrix Instructions (Page 38) There are only two hourly rate categories listed in the table. Can the bidder propose more than one hourly rate for each category based on the length of experience of the specific potential candidate?	The RFP requires two hourly rate categories (intermediate and expert). The negotiated rate may be any rate that does not exceed the proposed bid rate for each category.

No.	Question	Department Answer to Question
30	Does the state have any recommended format for Resumes of potential candidates?	You should use a format that matches skills of your proposed candidates to the skills as described in the RFP. Whenever an RFP evaluation committee scores proposed candidates, the easier it is to find the skills described, the better. They do not want to have to search through pages and pages of experience descriptions of experience unrelated to what is being sought in the RFP to try and find what they are looking for. Also, there should be a clear match between claimed skills and their source of qualification (specific training or experience) for the skill.
31	Could you also send me a MS Word version of the RFP form?	Same as question # 25: Alan Carlsen sent the RFP in Microsoft Word file format to each vendor who requested it. If anyone else wants it, please contact alancarlsen@utah.gov and he will send you a Word version of the RFP.
32	Section 1.4 requires softcopies of the RFP in PDF format. Can the soft copies submitted be in word (.doc) format?	Yes, Word is acceptable. Our intent is to be able to build contracts using electronic file formats of proposals without scanning them. Microsoft Word is as acceptable to do this as Adobe.pdf file formats.
33	Section 1.8 addresses Price Guarantees. With good resources becoming more difficult to find, the rates are escalating and will probable continue over the next couple years. Under what circumstances will the State approve project role rate increases down the road?	No rate increases will be considered during the duration of this contract, nor the potential of the one-year contract extension.
34	Paragraph 6 in the Department of Workforce Services Modified Terms and Conditions refers to monthly invoices. Will it be possible to submit invoices Semi-monthly?	This could potentially be negotiated in the contract negotiations, if desired. Please indicate this on your list of proposed changes to a T&C, as instructed within the RFP.
35	Our organization has had resources on the eRep project for some time. Management of that organization knows the work quality of our company. Is there a specific reason we are not allowed to use them?	Refer to Question # 8: Resources who previously worked or are currently working on the eREP project <u>can be listed as "potential candidates"</u> . Concerning references, we already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.
36	Section 3.1.4 requires us to submit resumes in evidence of our ability to provide candidates. Can we use resumes of individuals who currently or previously worked on the eRep project?	Refer to Question # 8: Resources who previously worked or are currently working on the eREP project <u>can be listed as "potential candidates"</u> . Concerning references, we already know the performance of firms and consultants that have worked on other portions of the eREP project, so don't send us the same information, instead send references for three different projects.
37	Section 3.2.2 addresses required Curam Certification. Can we have an estimate of cost and time associated with getting our contracting staff Curam Certified to meet your requirements?	Per section 3.2.2, "it is <i>encouraged</i> that the contractor staff are Curam certified..." The State recommends contacting Curam Software, Inc for the cost and time associated with certification.

No.	Question	Department Answer to Question
38	<p>3.1.3 Corporate References</p> <p>1. Is the State of Utah requesting 3 corporate references <u>per skill area</u> outlined under 3.1.5. For example, if a vendor is bidding on all 12 skill areas, should 36 references be included (3 references * 12 skill areas)?</p>	<p>The State requests a total of 3 corporate references, regardless of the number of skill areas being bid.</p>
39	<p>What format is expected for the corporate references; Name and contact info? A letter of recommendation with contact info? A case study outlining the scope of the staffing engagement with contact info? Please clarify.</p>	<p>We require current, valid contact information, not out of date telephone numbers / addresses, etc. Reference information must include the correct name of the reference, correct telephone number of the reference, correct name of the organization being contacted by us, etc.</p> <p>You must also provide us with sufficient descriptive information so that we can carry on a reasonable conversational description with the reference person of what project you worked on, a very brief description of the project, a list of your firms employees who worked on their project, etc. <u>Also, there must be an approved “written authorization by you for your cited reference to be able to release the reference information to us” when we request it.</u></p> <p>We are not requesting letters of reference; we are going to contact and verify what you are telling us. We are not requesting case studies; we are going to contact and verify what you are telling us. Just give us enough information so that when we contact and verify we can carry on a reasonable conversation, with pre-approved authorizations from your firm for them to release the information. You also should pre-check with the firm that you are indicating to us will be your reference that they will actually release this type of information with an approved authorization, because some firms just won’t release any reference information.</p> <p>If we cannot, after exercising a reasonable amount of effort, obtain adequate references, we reserve the right to eliminate your proposal from further consideration.</p>
40	<p>Page 39. Section 5, Proposal Response Format, Point 3. Paragraph b.</p> <p>This paragraph asks for a specific point by point response, “in the order listed”, to each requirement in the RFP. Is the phrase “in the order listed” referring to the order on page 39: RFP Form, Executive Summary, Detailed Response, Cost proposal? Or is phrase referring to some other point in the RFP?</p>	<p>Please match your response to the appropriate RFP paragraph at the numbered paragraph level, with the following exceptions:</p> <p>With respect to the T&Cs in section 2, if you agree with them all, you can so indicate for the section as a whole. If you disagree with any T&C’s within section 2, please state whether it is a state or department T&C and the number.</p> <p>When completing the skills matrix templates, please respond to each line item within each numbered paragraph.</p>
41	<p>Page 41. Section 7</p> <p>1. Should the technical and pricing requirements checklist on page 41 be included in the RFP response? If so where?</p>	<p>Put the technical requirements checklist in the sealed technical proposal, without the pricing requirements checklist.. This can be the last page.</p> <p>Put the pricing requirements checklist in the <u>separate sealed pricing proposal..</u> This can be the last page.</p>

No.	Question	Department Answer to Question
42	<p>GENERAL Questions</p> <p>How should objections to the State's Term's & Conditions be handled if there are any? Should vendor's submit a red lined document showing the requested changes or submit a changed document in the form of an addendum for the state to review and approve?</p>	<p>Please state on a cover page to the T&C response section whether you agree or disagree with the T&C's. If you propose any deviation from any T&C, we need to know specifically what words you are proposing to add, what words you are proposing to delete. We will then have to analyze the effect, working with our DWS Legal Staff, and determine our position. Use of a document with strikeouts and added words highlighted is the best methodology. We can get you a Word version of the RFP, if desired, to make it easier.</p>
43	<p>If a respondent to this RFP has established partnerships with Corp – to – Corp sub vendors or 1099 contractors and those partners / contractors agree to the State of Utah's Terms & Conditions can the primary vendor utilize those sub-vendors to assist in the staffing of this project?</p>	<p>Yes. We have no problem with your firm using subcontractors. The contract is with the primary vendor and not the subcontractor. We have no problem with your firm using subcontractors.</p>
44	<p>2. a If the answer to the above question is YES. Can the primary respondent utilize any of the 1099 partners or sub-vendors corporate references in the RFP response to satisfy the corporate references requirement of the RFP? I.e. Do all 3 references from 3 different companies need to be specific to the primary respondent to the RFP?</p>	<p>As a primary vendor, our objective is to evaluate whether your company can provide sufficient resources. The references submitted should come from the provider of the resources, whether that is the primary vendor or their subcontractors.</p>
45	<p>Section 25 - Conflict of Terms in the State Terms and Conditions stipulates that the order of precedence in the event of any conflict is the State Standard Terms and Conditions, State Special Terms and Conditions, and Contractor Terms and Conditions. Please clarify the following:</p> <ol style="list-style-type: none"> 1. Are the Proposal Instructions and General Provisions to be considered as State Standard Terms and Conditions or as State Special Terms and Conditions? 2. Are the Department of Workforce Services Terms and Conditions to be considered as State Standard Terms and Conditions or as State Special Terms and Conditions? 3. If both of these sections are to be regarded as State Special Terms and Conditions, what is the order of precedence between these two? 	<p>Proposal Instructions are considered to be part of the RFP, which becomes part of Attachment B of the contract.</p> <p>The State of Utah Contract Form FI-84 wording takes precedence over all attachments, since it bears the approval signatures of all parties. Paragraph 6 of the FI-84 brings in the Attachments.</p> <p>The precedence is Attachment A first (State T&C's on pages 14 thru 17 of the RFP) , then Attachment C (DWS T&C's on pages 18 thru 24 of the RFP), then Attachment B: The Scope of Work which consists of the RFP(including proposal instructions) and RFP Addenda, and the Vendor's Proposal in Response to the RFP.</p> <p>As referred to in State T&C Clause 25 on page 17 of the RFP:</p> <ol style="list-style-type: none"> 1. State Standard T&C's are the State T&Cs; 2. State Special T&Cs are the DWS T&C's; and 3. Contractor T&Cs would be any new T&Cs that you propose adding.
46	<p>Section 3.1.1 states that a vendor may choose to bid or not to bid on any expertise area, and that the state may select a vendor for some or all of the experience areas that the vendor chooses to bid. Is it also the case that the state may, if it chooses, select more than one vendor for a given experience area?</p>	<p>Reference Section 6.3 Selection: "Up-to the five highest rated vendors for each expertise area will be considered for selection based on the technical evaluation..."</p>

No.	Question	Department Answer to Question
47	<p>Pricing Requisite 4.1.3 states that "positions will be considered full-time (40 hour work week) unless otherwise stated."</p> <p>Are there any conditions under which the state could request a resource on other than a full-time basis under a contract resulting from this solicitation? In that event, would the fully-loaded rates provided in our proposal be subject to renegotiation?</p>	<p>There are no conditions under which the State will request a resource other than full-time basis. Resources will be paid on an hourly basis for work performed.</p>
48	<p>The questions portion (1.9 page 13) of the RFP does state that "Questions received after that date may not be answered. It sounds like its discretionary.</p> <p>Question: Page 40 6.3 Selection "Up to the five highest rated vendors for each expertise area will be considered for selection". Is this statement saying that the state will award no more than 5 vendors per skill area?</p>	<p>The State has the option to provide additional information through an RFP Addendum. However, the closing date for questions was October 21, 2005 and would need to release an addendum to change that date.</p> <p>The interpretation of the statement "Up to the five highest rated vendors for each expertise area will be considered for selection" is correct. That is, the state will award no more than 5 vendors per skill area.</p>